

## C. Navigating Coeus

### C.1. Navigation bar

The Navigation buttons on the left hand side of the screen include the sections required to prepare a proposal. Each button represents a different screen. When selected, the view will change from one screen to another, leaving the navigation buttons unchanged. The Budget button is the exception. When selected, it not only switches to the budget screen, but an entirely new set of functions is displayed.

CoeusLite provides buttons and links to move throughout the application. Where possible, avoid using the internet browser's *Back* function. Using this function can generate system errors.

### C.2. Mandatory fields

Coeus does not have many mandatory fields, but those required are marked with a **red asterisk (\*)**. Data must be entered before saving or leaving a screen that contains mandatory fields.

The screenshot displays the 'General Information' screen in the Coeus application. The left-hand navigation bar is highlighted with a red box, showing options like 'General Info', 'Organization', 'Investigator's Key Persons', 'Credit Split', 'Special Review', 'Abstract', 'Others', 'YNO', 'Proposal Roles', 'Grants.Gov', 'Budget', 'Upload Attachments', 'Validate', 'Submit for Approval', 'Print', and 'Copy Proposal'. The main content area shows the following details:

- Investigator:** Scanlon, Donna M
- Agency/Sponsor:** 000039 : US Department of Education
- Title:** Education TS 52007
- Lead Unit:** 8650 : 010 University at Albany
- Last Updated:** 2007-05-20 14:56:45.0 by Sayer, Tamar T
- Proposal #:** 00000205 (In Progress)
- Proposal Period:** 10/01/2007 - 09/30/2009

The 'General Proposal Information' section includes the following fields, with red asterisks indicating mandatory entries:

- \*Proposal Type:** New
- \*Activity Type:** Organized Research
- \*Start Date:** 10/01/2007
- \*End Date:** 09/30/2009
- Original Proposal Number:** [Search]
- Award #:** [Search]
- \*Agency/Sponsor:** 000039 [Search] US Department of Education
- Prime Sponsor:** [Search]
- Proposal Deadline Date:** 06/29/2007
- NSF Science Code:** -----Please Select-----
- Sponsor Proposal No.:** [Text Field]
- \*Title:** Education TS 52007
- Program Title:** [Text Field]
- Proposal in Response:** Federal Solicitation
- Sub Contract:**
- Opportunity Id:** [Text Field]
- CFDA Number:** [Text Field]

Figure C.1. General Information Screen

### C.3. Searching with the Wildcard

Coeus has a number of pre-populated data tables that makes proposal preparation more efficient. For example, when identifying a Sponsor in a proposal, adding a person as an Investigator, or selecting a Department for crediting, it is important to

use the search functions to retrieve the correct data from the Coeus tables. Coeus provides a tool to simplify the search function – the “wildcard”.

The wildcard is a special character (the asterisk “\*”) that takes the place of zero or more other letters or spaces. It should be used for ALL searches in Coeus. For example, if searching for the National Institutes of Health among the Sponsor table, one might be tempted to type in the entire name. This is not recommended. Unless it is typed in EXACTLY as it is found in the data table, including all capitals, spaces, etc., the search will be unsuccessful. Instead, use the wildcard character to improve the search results.

For example, to search for all sponsors that begin with the word “National”, type in “National\*”, or to search for any sponsor that contains the word “Institute”, type in “\*Institute\*”. To look for any sponsor that ends with the word “Health”, type in “\*Health”.

Other examples:

\*genomics\* - to search for an entry that contains the word “genomics”

Inst\*cancer\* - to search for an entry that begins with the characters “Inst” **AND** contains the word “cancer”

\*spen\*foundation - to search for an entry that contains the characters “spen” **AND** ends with the word “foundation”.

#### C.4. Searchable Fields

When navigating through CoeusLite screens, many fields will include a Search option. The search utility should be used when available.

Coeus fields that may be searched include:

- Proposals
- Sponsors
- Coeus Users
- Employees (SUNY and Research Foundation)
- Other People (Non-employees)
- Performance Locations
- Units (Departments, Centers, Institutes)

#### C.5. Click-happy Users

Coeus is a web-based application and some delays should be expected when retrieving data from the installation in Buffalo. Refrain from repetitive clicking of the mouse button to avoid generating communication errors.

